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ABSTRACT

This guide for setting up a job development/job placement file is based on information obtained from the following sources: (1) site inspections of filing systems used by several Illinois and Missouri high schools and community colleges; (2) a questionnaire mailed to fifty-three job placement specialists, of which 41.5% were completed and returned; (3) discussions with project consultants; and (4) the University of Missouri and the Department of Education for Illinois. Following a brief introduction and definitions of key terms, a step-by-step outline explains how to set up the file. Suggestions for records management, minimum equipment, and minimum supplies are listed. Other information found in this guide includes guidelines for classifying the subject matter, supporting information, and a list of needed records and forms. Finally, a survey form is appended that was used to gather information needed in developing this records system guide. (BM)

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FINAL REPORT

FILE GUIDE

FOR

JOB DEVELOPMENT - JOB PLACEMENT

PROJECT 2270

by

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in Cooperation with

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U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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Records Management - A Filing Guide

For

Job Development - Job Placement

1978

Introduction

The following "file guide" was developed with funds obtained through a Level II grant from the Research Coordinating Unit of the Department of Elementary and Secondary Education under provisions of section 131b of the Vocational Admendments.

Consultants for the project included Mr. Charles Foster, Director, Guidance and Counseling; Mr. Edgar I. Ailor, Supervisor, Guidance and Counseling, Department of Elementary and Secondary Education; Mr. Joe Logan, Assistant Director Adult and Vocational Education, Hickman High School, Columbia, Missouri; Mr. Gary Noland, Job Placement Coordinator, State Fair Community College; Mr. Ward Kaminsky, Job Placement Coordinator, Special School District, St. Louis, Missouri; and Mr. Pete Ross, Job Placement Coordinator, Jefferson Community College, Hillsboro, Missouri. Kent Barber, Director of School Law Information and Secretary of State, James C. Kirkpatrick, provided information on permanent records required.

The project consisted of (1) on site inspections of filing systems used by State Fair Community College, Hickman High School, Special School District, St. Louis and Jefferson Community College. (2) A questionnaire mailed to 53 job placement specialist, of which 41.5% were completed and returned. (3) Discussions with the project consultants. (4) Information obtained from the University of Missouri and the Department of Education for Illinois.

A major reference used was "Records Management, A Collegiate Course in Filing Systems and Procedures" by Johnson and Kallaus - Second Edition.

Definitions

Coding: The physical act of marking material to be filed to indicate its placement in the file.

Guide: Rigid dividers in filing drawers.

Major Subject Guide: A guide introducing a main division in a file.

Primary Subject Title: Subdivision of a major subject.

Secondary Subject Title: Subdivision of a primary subject.

Out Folder: A folder with the word "Out" printed on the tab and in a color that can readily be seen in the file. It replaces a folder in the file drawer when that folder is temporarily removed.

Folder, Individual: The individual folder is used for materials to be filed behind each file guide, folders are placed in the file in alphabetical order.

Folder, Special: Special folders may be required for special materials pertaining to subdivisions of a division of the file. They too, are filed alphabetically.

Folder, Suspension: Folders that hand on metal rods at the sides of a drawer.

Label, folders and guides: Usually a gummed strip placed on folders and guides with identifying information.

Label, file cabinets and drawers: Identifying information on the front of file container.

Indexing: Determining where an item should be filed.

Cross-reference: Any material which contains more than one subject or sets of data may need to be cross-referenced on the index card or if no index system is used, additional copies may be made and filed under each subject covered in the material.

File Cabinet: A container whereby things are kept in order.

Book Case: A case with shelves for housing books or other materials.

Card Index File: A card record of the numbers and/or subject assigned to the material that has been filed.

Desk: A table, frame or case used for reading or writing, often with drawers or compartments.

__k Holding Trays: An open receptacle with a flat bottom and low rim for holding articles.

Accession Book: A book record of the numbers and/or subject assigned to the material that has been filed.

Open File: Completed folders of material filed on open shelving and tiered horizontally.

HOW TO SET UP YOUR FILE

Step I. Make the following decisions:

1. What filing equipment will I use?
2. What filing supplies will I need?
3. What records and material will be placed in 4 drawer letter sized files.
4. What records and materials will be filed in the Job Placement Coordinator's desk?
5. What records and materials will be filed in book shelves in the Job Placement Coordinator's Office?
6. What records and materials will be placed in the library or Instructional Resource Center?
7. What records will be stored in computers?
8. What records and materials will be stored in other ways and in other places? Make a list for your office records and use.

Step II. Build your file guide.

1. Make an outline of the records and materials to be stored (filed).
2. First, list major subject titles.
3. Prepare center cut guides for all Major Subject titles. Place labels on the guides and arrange in alphabetical order. Example: ADMINISTRATION. See page 8 for instructions for making Major Subject title labels.

4. Number each Major Subject guide. Number consecutively.
5. List primary subject titles you wish to use in each Major Subject title. Arrange alphabetically.
6. Make labels for each Primary Subject title under each Major Subject title. Place these labels on left hand cut folders. Arrange alphabetically behind the Major Subject title guide. See page 8 for instructions on making labels.
7. In addition to the alphabetical arrangement of the Primary and Secondary subject titles, the first folder behind the Major Subject title guide is for Correspondence and the last folder in that Major Subject Title group is for miscellaneous.
8. Under one or more of the Primary titles you may want to further sub-divide the materials or records into "Secondary" subject titles and file in separate folders. Place the secondary subject title label on right hand cut folders and file these folders behind the appropriate Primary subject title folder. See page 8 for instructions on making Secondary subject title labels.

9. Prepare <u>two</u> sets of Major Subject title guides, Primary subject title folders and Secondary subject title folders. Use one set of these guides and folders for materials and records in your current file. The second set is to be used to start your new file.
10. Prepare a list of materials and records you want to keep in your permanent file. A permanent file should contain all records requiring storage for 1, 2, 3, 4, or 5 or more years.
11. Prepare guide labels and folder labels. See page 8 for instructions for making permanent file guide labels and folder labels.
12. Arrange permanent file guides and folders in the file alphabetically.

Step III. Develop a Guide to Labeling

1. Select a color code for labels: Example--

   Red - Use Red labels for guides.

   Yellow - Use Yellow labels on Primary folders.

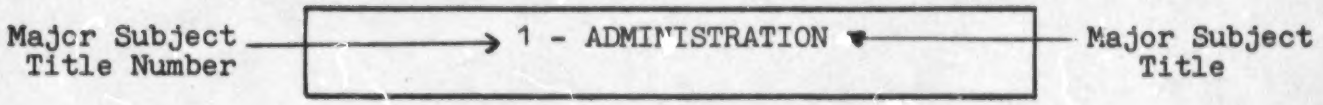
   Blue - Use Blue labels on Secondary folders.

2. Arrange label information as follows:

a. Major Subject Title (guide) label

Example:

This label is color coded Red.

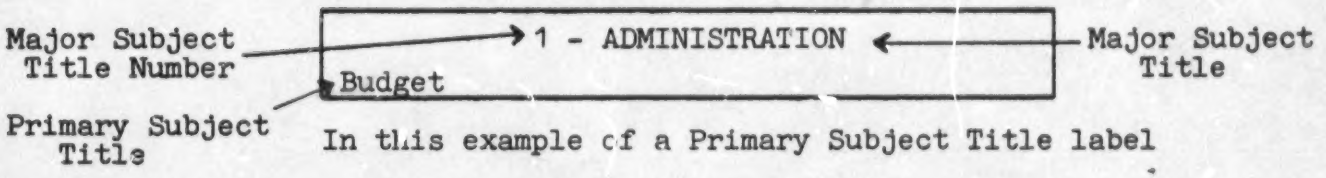


In this example the 1 designates the number of the Major subject title group. ADMINISTRATION, in capital letters at the top center of the label, shows the Major Subject Title. The Major Subject Number and Title are always placed at the top center of the label.

b. Primary Subject Title (folder) label

Example:

This label is color coded yellow.

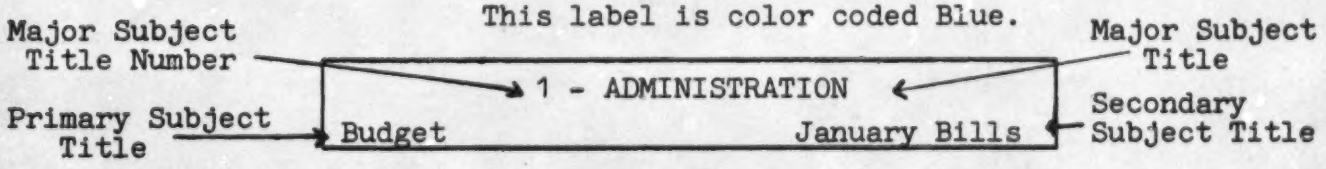


In this example of a Primary Subject Title label is an extension of the information shown on the guide label. Again the Major Subject Title Number and Title are centered at the top of the label and the Primary Subject title is at the lower left hand corner of the label.

c. Secondary Subject Title (folder) label

Example:

This label is color coded Blue.



Records Management:

1. All material to be filed is coded by the Job Placement Coordinator or the person designated by him or her to do the coding.
2. The placement of coded materials in the file is done by the Job Placement Secretary or some other records management designee.
3. Removal of materials from the file is done by the Job Placement secretary or the records management designee.
4. When removing material from the file, remove the folder in which it is filed and replace the folder with an "Out" folder. If more than one employee uses the files, then a record of the material removed should be placed in the "Out" folder. The record should show the name of the person who is using the material, the date and time it was checked out and the date and time it is to be returned.
5. For most smaller Job Placement Offices, it will not be necessary to index coded materials as they are filed. However, larger schools might find a card index or accession book index essential.
6. Control and safety of Job Placement Records is the responsibility of the Job Placement Coordinator. All filing and office equipment should be provided with locks and the office occupied by placement staff should be private and the Job Placement Coordinator

is responsible for keeping the office locked when not in use.

7. Even the smaller schools may find the use of computers beneficial in storage and retrival of certain types of information. Larger schools will no doubt continue to find new ways to make more use of computers in records management.
8. Inactive files should include all records and materials required by the school and by law.

Minimum Equipment suggested for Job Placement Records storage follows:

2 - 4 drawer (letter size) file cabinets

1 - Office desk with lockable drawers

1 - 4 shelf book case (3 or more feet long)

2 - trays to hold materials designated for filing

Other suggested equipment

8 - folder hangers if hanging folders are used

1 - card index file

1 - accession book

Computer equipment if available to the school

Minimum Supplies:

File guides - 20 to 50

Folders - 200 to 500

Out folders - 10

File guide lines

Labels (tabs) for folders and files - 200 to 500

Other supplies suggested

Index cards

Accession book

Hanging folders

Folders for computer printouts

Computer tapes, etc.

A File Guide For

Job Development - Job Placement

File Classification Guide: In this manual, subject matter is broken into major subject groups. Material in each group is arranged alphabetically unless otherwise designated. In some instances major subject groups are divided into primary subject titles and further subdivided into secondary subject titles for filing purposes. Again, all primary and secondary subject titles are filed alphabetically unless otherwise designated. All materials generated or received by Job Development - Job Placement offices should fall within the scope of one of the subjects of this file classification guide.

File Index:

Major Subject Group (guide)	Primary Subject Title (folder)
1 - Administration	1 - Correspondence 1 - Administrator Memos 1 - Advisory Committee 1 - Budget 1 - Personnel 1 - Plans of Work 1 - Program Evaluation 1 - Program Operation 1 - State Dept. of Elem. & Secondary Education 1 - Miscellaneous

Example: A secondary subject title may be made under budget to provide a folder for each month of the year in which to file paid bills. When a bill is paid, staple the requisition, purchase order and invoice together and file in the folder for the month it was paid.

Examples of secondary titles under the primary title of personnel are:

Applications
Individual personnel folder - one for each employee
Time Sheets - a folder for each month or each employee.

Major Subject Group (guide)	Primary Subject Title (folder)
2 - Careers	2 - Correspondence
	2 - Area Employers
	2 - Career Development Service
	2 - Career Education for Leisure Occupations
	2 - Career Education Update
	2 - Careers in U. S. Military
	2 - Collegiate Woman's Career Magazine
	2 - Directory of National Unions & Employee Associations
	2 - Employment of High School Graduates & Dropouts
	2 - Journal of College Placement
	2 - Looking ahead to a Career - A Slide Series
	2 - Missouri Employment Outlook
	2 - New Careers in Local Government
	2 - Occupational Employment Statistics
	2 - The Labor Market for College Graduates
	2 - The Occupational Outlook Quarterly
	2 - Toward Matching Personnel & Job Characteristics
	2 - Work Life
	2 - D. O. T. List
	2 - Miscellaneous

Note: A secondary subject title may be made under each primary subject title above and material filed alphabetically or numerically.

Major Subject Group (guide)	Primary Subject Title (folder)
3 - Followup	3 - Correspondence 3 - Employer - 1st year 3 - Employer - 3rd year 3 - Student - 1st year 3 - Student - 3rd year 3 - Student - 5th year 3 - Miscellaneous
Major Subject Group (guide)	**Primary Subject Title (folder)**
4 - Forms (All forms used in Job Placement)	4 - Correspondence 4 - File copies of each form in individual folders labeled with the title of the form - file alphabetically 4 - Miscellaneous
Major Subject Group (guide)	**Primary Subject Title (folder)**
5 - Job Development	5 - Correspondence 5 - Employer Profiles 5 - Job Orders 5 - Lists 5 - Personnel Publication 5 - Miscellaneous
Major Subject Group (guide)	**Primary Subject Title (folder)**
6 - Laws & Regulations	6 - Correspondence 6 - Equal Employment 6 - Minimum Wage 6 - Privacy of Information 6 - Retirement 6 - Sex Discrimination 6 - Social Security 6 - State & Federal Regulations 6 - Workman Compensation 6 - Miscellaneous
Major Subject Group (guide)	**Primary Subject Title (folder)**
7 - Pre-Employment Preparation	7 - Correspondence 7 - Cover Letters 7 - Interviews 7 - Job Objectives 7 - Job Research 7 - Occupational File 7 - Profiles 7 - Resumes 7 - Self Evaluation 7 - Strategy 7 - Miscellaneous

Major Subject Group (guide)	Primary Subject Title (folder)
8 - School Records	8 - Correspondence 8 - News Release 8 - Policies 8 - School Bulletins 8 - Miscellaneous
Major Subject Group (guide)	**Primary Subject Title (folder)**
9 - Student Records *File by program area alphabetically	9 - Correspondence *9 - Applications *9 - Enrollments *9 - Profiles *9 - Referrals *9 - Resumes
Major Subject Group (guide)	**Primary Subject Title (folder)**
10 - Student Training	10 - Correspondence 10 - Class Enrollment 10 - Course Evaluation 10 - Curriculum 10 - Miscellaneous
Major Subject Group (guide)	**Primary Subject Title (folder)**
11 - Special Project Note: Set up special project files for each project. Use the project title for the major subject group and place in file alphabetically.	11 - Correspondence 11 - Budget 11 - Data 11 - Financial Records 11 - Project Plans 11 - Reports 11 - Miscellaneous

Supporting Information

A survey of 53 Job Development-Job Placement Coordinators in high schools, area vocational schools and junior colleges in Missouri was made to determine their opinion of the kind of a records storage system which most nearly suits the needs of Job Placement staff and to determine the systems now being used. (See appendix "A" for the instrument used.) A summary of that survey follows:

Seventy-five percent of the Job Development-Job Placement Coordinators responding to the survey suggested using the Alphabetical System of record storage for Job Development-Job Placement records. However, they recommended the use of Subject Matter by Alphabetical sequence for Correspondence, Student Profiles, Student Resumes, Employer Profiles, Job Orders, Job Development, Student Followup, Employer Followup, Pre-Employment Training and Administration Records. It was suggested that employer data be filed by zip code if the school or college serves metropolitan employers. Likewise, it was suggested that student records be filed by program area alphabetically.

Coding of materials to be filed should be done by the Job Placement Coordinator, while the secretary or similar person should do the filing and remove materials from the file. In the absence of the secretary, the Job Placement Coordinator may take materials from the file but should not replace it.

Using an index of materials filed becomes more important as the volume of materials filed increases. Two indexing methods are suggested - Index Cards and Accession Book.

Once material is filed, and it is removed for any use, remove the folder in which it is filed when said material is checked out. Do not remove the material from the folder.

A record of materials removed from the file should be maintained. Use an "Out" folder or guide and record the time and date removed, name of person to whom it was checked out and the date to be returned.

Control of Job Development-Job Placement materials is placed in the hands of the Job Placement Coordinator. Two or more people cannot successfully share the responsibility.

Record safety is not a major problem with Job Placement Coordinators. However, it is suggested by this project's respondents that private office space with filing cabinets and desks that lock are essential. Of the respondents, 23.8% are using computers for some portion of their records management system.

Standard 4 drawer letter file cabinets with hanging folders are suggested for records storage when computers are not used. Fifty-three percent recommended the use of a card index to record what is in the file.

Permanent Record File

Certain records accumulated during the school year will need to be kept in the permanent files. The Local Records Board establishes the records retention policy for public schools and community colleges. A copy of the "Missouri Public Schools Records Manual" or of the "Missouri Junior College Records Manual" may be obtained from your school administrator or from Mr. James C. Kirkpatrick, Secretary of State.

It is not our intention here to suggest which records you should keep but rather to suggest you follow the instructions of the Local Records Board.

Among the records listed by the board are:

Junior Colleges

Student Counseling Records - referrals, etc.
Detailed Expenditures Ledger
Requisitions - Purchase Orders - Invoices
V-2 and V-4's
Minutes of Advisory Committee Meetings
Personnel Policies and Salary Records
Workman's Compensation Claims
Audit Reports
Evaluation
Inventory Records
Followup Reports

Public Schools

All the above plus--
Class Enrollments and Records

RECORD MANAGEMENT SYSTEMS STUDY

Done Under a Level II Grant
Under the provisions of Section 131b
of the Vocational Amendment of 1968

Research Coordinating Unit
Department of Elementary and Secondary Education
P. O. Box 480
Jefferson City, Missouri

A filing system which will enhance records management in Job Development-Job Placement is a vital part of the efficient and effective operation of the Job Development-Job Placement program.

Currently, numerous records management systems are being used by Job Development-Job Placement Coordinators. Systems now in use vary in their adaptability to efficient use.

This study is being made to gather information to use in developing a recommended records system guide (file guide).

Basic systems commonly used in filing and retrieving information, data and records are given below. Would you please rate their adaptability for use by Job Development-Job Placement Coordinators.

Important Instructions

On the following pages, give your opinion of the importance of this method of filing Job-Development-Job-Placement records. In each of the following questions you should circle the number which most nearly represents your opinion of the adaptability of each system of filing for use by Job Development-Job Placement Offices. Please note that 9 different systems are given in each section. Circle one number for each of the nine. If you list yet another system, be sure to circle a number for it also.

I. Overall System: (All records, subjectmatter, data and information)

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

II. Individual Parts of the Record Management System:

A. Correspondence (copies of incoming and outgoing letters, memos, news, etc.)

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

B. Student Profile (Application for instruction and counseling-pre-employment)

	Very Good							Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

C. Student resumes, interview referrals, etc.

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

D. Employer profiles (information showing employment needs, etc.)

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

E. Job Orders (Active and inactive)

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

F. Job Development with employers (contacts with employers, comments, recommendations, etc.)

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

G. Student Follow-up (Example 1st year, 3rd year)

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

H. Employer Follow-up - Follow-Through

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

I. Pre-Employment training

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

J. Administrative Records (Budget, plans of work, requisitions, etc.)

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

K. Job Development - Job Placement Reference Materials

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

L. Subject Matter - State & Federal regulations, insurance, retirement, Social Security, minimum wate, etc.

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

M. Careers - D.O.T. listing of jobs available in area - career selection

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

N. Student Follow-through - Record of action taken to assist each student

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

O. List any other section of your file and rate:

List:_____

	Very Good							Very Poor
1. Alphabetical-Name	1	2	3	4	5	6	7	8
2. Alphabetical-Numerical	1	2	3	4	5	6	7	8
3. Alphabetical-Subject Matter	1	2	3	4	5	6	7	8
4. Subject Matter	1	2	3	4	5	6	7	8
5. Subject Matter-Numerical	1	2	3	4	5	6	7	8
6. Geographic	1	2	3	4	5	6	7	8
7. Geographic-Numerical	1	2	3	4	5	6	7	8
8. Geographic-Subject Matter	1	2	3	4	5	6	7	8
9. Geographic-Zip Code	1	2	3	4	5	6	7	8
10. Other (list)_____	1	2	3	4	5	6	7	8

Comments_____

III. Coding and Moving Materials in and Out of the File

1. Who codes the material to be filed? Name_____

   Position_____

   Comments_____

   _____

2. Who is in charge of entering materials in the filing system?

   Name_____ Position_____

   Comments_____

   _____

3. Who is responsible for removing materials from your filing system? Name_____ Position_____

   Comments_____

   _____

NOTE: If more than one person has responsibility for 1, 2, and 3 above, so note. Explain on the back of this page.

4. Should a record be made of materials removed from the file?

   (Check one)_____yes _____no

   Comments_____

   _____

5. Do you use an "OUT" folder to mark the place in the file when folders are removed?

   (Check one) _____yes _____no

   Comments_____

   _____

6. When materials are removed should they be removed from the folder and the folder left in the file?

   (Check one)_____yes _____no

   Comments_____

   _____

7. Do you use an index system for materials placed in your file?

(check one) _____yes _____no

Comments_____

_____

8. If your answer to (7) above is yes, what do you use?

Check those which apply.

_____index cards

_____accession book

_____combination index card and assession book

_____other (list)_____

Comments_____

_____

9. Do you have full control of Job Placement records and responsibility for their security?

(Check one) _____yes _____no

Comments_____

_____

10. Do you have a private office which you can lock? _____yes ____no

Do you have files which you can lock? _____yes _____no

Do you have a private desk which you can lock?_____yes _____no

11. Are you using computers for any part of your records system?

(Check one) _____yes _____no

If yes, please list those parts of the filing system which you now have on computers.

a. _____

b. _____

c. _____

d. _____

e. _____

Also list other parts of your filing system which you think should be done on computer.

a. _____

b. _____

c. _____

d. _____

e. _____

IV. Equipment - Listed below are kinds of equipment commonly used in filing systems. Please check those you use.

- ☐ Standard 4 drawer filing cabinet
- ☐ Legal size 4 drawer filing cabinet
- ☐ Combination safe and letter file
- ☐ Vertical visible file cabinet
- ☐ Conveyor files
- ☐ Rotary file cabinet
- ☐ Open shelf files
- ☐ Motorized rotary file
- ☐ File caddy
- ☐ Electro file
- ☐ Oblique suspended folder cabinet
- ☐ Filing cabinet with folder hangers
- ☐ Sorter (to use in sorting alphabetical)
- ☐ McBee Key sort
- ☐ Card wheel file
- ☐ Card book
- ☐ Card index file
- ☐ Other (list)_____
- ☐ Other (list)_____
- ☐ Other (list)_____
- ☐ Other (list)_____

Comments:_____

_____

V. Records Management Supplies

1. Please place a check mark in the box in front of each type of supply you currently use in your Job Development - Job Placement file.

- ☐ Guide lines for filing
- ☐ Standard folder (11½ x 9)
- ☐ Legal folder (14 x 9)
- ☐ Hanging folder (11½ x 9)
- ☐ Hanging folder (14 x 9)
- ☐ Accession book
- ☐ Index card
- ☐ Tabs for folders and guides
- ☐ McBee cards
- ☐ File guides (to divide sections in file drawer)
- ☐ Computer supplies (list those you use)

a._____ e._____

b._____ f._____

c._____ g._____

d._____ h._____

- ☐ "OUT" guide (to mark place where material is removed)
- ☐ Other (list)

a._____ e._____

b._____ f._____

c._____ g._____

d._____ h._____

Comments:_____

_____

_____

VI. The Inactive File

Please check the statements below which describe a good inactive file.

☐ Contains all records and correspondence one or more years old. A new file is started at the beginning of the new school year.

☐ A new file is set up at the beginning of each school year. Last years file is kept in tact for one year or until materials are needed from the old file. Once the materials are used in the current school year it is filed in the current year file.

☐ All Job Development-Job Placement materials are kept in one file. I do not use an inactive file.

☐ Correspondence and other similar materials are kept in the inactive file one year. If not used during that time they are disposed of.

☐ All student records, resumes, follow-up information more than one year old are placed in the inactive (permanent) records file.

a. List those records you place in your permanent records file.

(1) _____ (4) _____

(2) _____ (5) _____

(3) _____ (6) _____.

Comments: _____

_____

_____